

Departmental Action Plan Template

Student Name: Joseph Bonilla

Class & Student Number: 331 - Joey Bonilla

Academy Week (Var II): 5

Current situation or challenge you want to address based on the Jennifer Suzuki Outline.

1. Phone call leads are not handled very well for both new and used car prospects. Questions and basic information to and from potential prospects are being missed and overlooked.
2. Follow up by sales team is lacking therefore missing very important sales opportunities.
3. BMW is expanding its portfolio and model line up due to increased competition it is imperative that we do not miss precious prospects by not answering phones correctly.

Overall Objective and Specific Desired Results:

Desired results are maximizing phone leads with getting the proper information and following a phone script process. This must be implemented by management, ensuring everyone is on the same page with a small individual portion of the script. This allows the sales team to have some skin in the game by buying into the phone script format. - This will minimize phone ups and lost sales due to lack of information obtained or requested.

Follow up will also be measured and monitored through the CRM and spot checks on information recorded into the CRM.

Review and build momentum on new product through training, reviewing strengths, finance and lease programs as well as show and tells.

Describe your action plan in detail (be specific and include before and after measurements)

The phone script process will be rolled out in several meetings in a 48-hour period. Everyone will give feedback and any changes made that evening to the script to the sales team feedback. We will have the team pledge to follow the program! We will have daily meetings reviewing the inbound sales calls that are recorded via the CRM. Any deficiencies will be addressed, and training provided. Training must be at the highest priority! After 2 weeks phone lead conversions will increase if all steps are accomplished by the sales team and more importantly the sales managers. Leads are our lifeline, and everyone must be onboard.

CRM details should be followed with the correct follow up attempts by phone, email and text. If these are not followed they will be extreme consequences with disciplinary action as this is non-negotiable due to the ease of format and being in front of the prospect. Lead conversions from the CRM will increase due to increased and persistent follow up from the sales team. Consistency will prevail and must be rewarded and acknowledged by management and peers.

Enthusiasm in the product must be exemplified by management. Management must take the initiative to learn the product and find a way to get the buy in from the sales team.

Timeline:

Daily recaps on sales volume and phone call ups must be done daily with at least one phone call review performed. One day a good one and the other day one that was a challenge therefore a training opportunity is realized.

Weekly recaps on call volume and conversions along with CRM performance for individuals and the department. Must review how the team was impacted positively and or negatively by the team's efforts or lack thereof.

Monthly results for sales volume overall volume inbound and outbound, rewards and top performers acknowledged as well as most improved.

Meeting with Stakeholders (dealership personnel)

Describe what behavior change is needed to support desired goal. Address required coaching, training and/or consequences (PINO, Gain, Pain).
Include timelines / Accountability / Monitoring process

- a. Who: Jay Klein/Joe Long
- b. What: Phone call performance/CRM follow up process/Product knowledge
- c. By When: 09/30/2018
- d. How: Following the processes and timeline mentioned above.

Dealer agreement:

If you need your sponsors support or approval to implement your plan, have it signed off before you start. If you can proceed on your own, present this action plan to your sponsor before next class. Describe the meeting:
